Clinical Flow Modernization | FAQ

Table of Contents

Functionality

#	Question	Answer
1.	Where do I locate the historical immunization button?	Search for client profile → select “New Immunization” button on the top left-hand corner→ When entering the client record → depending on your permission sets you will either see “Administered” and “Historical” options → select “Historical” radio button and proceed to follow the job aid on how to record historical doses
2.	For pharmacies, will it bypass the administered screen and go straight to the VE screen (one less click)?	No, all users regardless of workstream will be required to select “Administered” during the dose administration process using the “New Immunization” button. Future enhancement coming to have administered set as the default so users will not have to select
3.	What types of documents or attachments would we attach in the Files tab of the immunization record (DA)?	The Files tab on the dose administration record is mainly used for: • Historical doses. For example, with an OOP dose, a PHU would upload OOP documents to show that the dose is valid. • Exemptions, example exemption form completed by PCP, a PHU would upload the exemption form
4.	Will proof of vaccination be populated under the Files tab?	Yes. The physical printout of the vaccination receipts (with no QR code) can be located on the Files tab in the client profile.
5.	Will the agent be tagged to the product?	Yes. All inventory available in COVax_{ON} is set up to have product mapped to a specific agent and lot(s) information. For example, COVID-19 mRNA (agent) is mapped to PFIZER-BIONTECH COVID-19 VACCINE mRNA (product).
6.	Is decoupling of inventory only related to historical doses?	Yes, decoupling inventory is only applicable for Historical record types with the subtype set to out of province (OOP), non-Ontario stock (NOS) and Other.
7.	Currently our staff searches for the client through the Vaccination Events	In order for the immunizer to search via the Vaccination Events tab, the registration staff will need to pull up the client profile (using the client search functionality) and make sure that they tag the

#	Question	Answer
	tab and filter by status (e.g., "checked in"). How would immunizers filter/search for the client through the Vaccination Events tab, if there is no longer check in, administer, and check out statuses?	vaccination event to the client profile. The vaccination event field can be found on the client profile under the “Details” tab → vaccine related section. Once the client profile has been tagged to the vaccination event, immunizers can go to the Vaccination Events tab → select the vaccination event name (via link) → select “Related” tab → select “View All” under client section → on the top right-hand corner there is a “Filter” button that will allow the immunizer to search through the list using client name, birth date and or gender → click “Apply”.
8.	Are there any mandatory fields that need to be completed in the client profile before staring a new DA?	First name, last name, and date of birth are mandatory fields. Other recommended fields to have completed are: • Client email (for the receipt URL) • Vaccination event • Reason for immunization • Health card number/COVID id (if applicable) • Primary Care Provider – The clients physician/nurse practitioner
9.	Can all files be accessed from the main profile?	No. Any files uploaded to a DA record's files tab will not automatically be seen on the client profile's - related tab only the generated receipts will be displayed. All other files will be associated to the specific DA record. For example, a proof of vaccination uploaded for a historical dose within the DA record will not show on the client profile.
10.	How will the changes impact inventory?	There are no changes to the inventory model.
11.	Will the current half dose inventory auto-decrement issue be resolved in the new CFM? (Will we have to continue to manually adjust our half dose inventory?)	No, the fix for the half dose inventory decrement issue will not be part of the CFM release on June 8th. Inventory managers will have to continue to manually adjust half dose until a fix is provided in later releases.

#	Question	Answer
12.	Can you only edit a dose admin record (e.g., update vaccine product) via the "Review Dose Administered" tab in the new CFM?	Yes, the only way to edit a DA record is through the "Review Dose Administered" button. The fields are locked in the DA record and won't allow you to edit.
13.	if Reason for Immunization (RIM) is already populated on the client profile, will that carry thru during the dose administration?	Yes, it will. Clinicians are encouraged to review VE and RIM when documenting the administered dose and update if required.
14.	In the current state, this functionality is labelled as "Any Adverse Events After Immunization?". In the future state, I only see "Immediate AEFI"? Is this essentially the same field?	Yes, it is. Future enhancement is that "Any Adverse Events After Immunization?" will be updated to immediate AEFI to ensure consistency in COVax$_{ON}$.
15.	If someone who doesn't consent for data collection, later decides they do, do users have to go in and re-activate old lot numbers in order to document previously administered dose?	There are no changes on this process in Build 16.0. For late POS records data entry, the user will need to activate the previous VEI first → record immunization record as POS → deactivate the VEI.

Process

#	Question	Answer
16.	How does the new CFM functionality support the process where you have a multi-person flow?	As part of the clinical flow modernization (CFM) change, the check in, administer, and check out buttons have been removed and replaced with the "New Immunization" button. However, the functionality that was part of the "check in" remains the same even though the check in button has been removed. For a two-person workflow the following steps are recommended:

#	Question	Answer
	How will mass immunization clinic roles work if there's no check in/check out? How do you make this work in an MIC setting? Can you still verify/update the VE when searching client?	1. “Check in”/registration a. Preform client search b. Ensure client profile information is accurately captured (e.g., check first name, last name, date of birth, contact information, review DA records) c. Fill out any missing client information on the profile i. Add/update email address (for email receipts) ii. Tag vaccination event to client profile iii. Check off consent for data collection iv. Record consent for follow up communication v. Add reason for immunization vi. Primary Care Provider – The clients physician/nurse practitioner 2. Immunizer/dose administration a. Perform client search either through the client search tab or through the vaccination events tab (only applicable if the check-in/registration has already tagged the VE to the client profile) b. Since the information should’ve already been validated by the check-in/registration, immunizers only need to verify the client identity (e.g., first name/last name/DOB) c. Proceed to record the dose administration via the “New Immunization” button 3. Check out/receipt generation a. Ensure there is an email on the client profile b. Go to the client DA record and click “Generate Receipt”
17.	Will the process to validate and review the DA be the same?	Yes. No changes have been made to the validation and review of the dose administration (DA) record. Please continue to use your clinical knowledge when reviewing and validating DA records.
18.	Are the steps to mark an incorrectly entered DA as “Entered in Error” still the same?	Yes. No changes have been made to changing the status of the dose administration record. Staff should be using the “Review Dose Administered” button (located on the top left-hand corner on the client profile) to make any changes/updates to the dose administration record.

#	Question	Answer
19.	Does adding historical doses continue to be done/limited to PHUs?	Yes.
20.	What are the user roles in the modernized system and how are existing user roles in the old system affected?	User roles and permission sets remain the same. As well, there are no changes to process of requesting additional/changes to COVax$_{ON}$ accounts.
21.	Are there any changes to the current system profiles/permission sets?	All system roles remain the same therefore anyone with site staff profile will be able to search, update profiles, and generate receipts. Immunizers will be able to perform all functionality of the site staff (e.g., search and update profile) in addition to recording doses administered.
22.	Are you maintaining the same structure where only a given list of individuals from each PHU can request accounts and submit tickets, etc.?	Yes, the process to request new/modifications to COVax$_{ON}$ accounts remains the same.

Best Practices

#	Question	Answer
23.	What's the best practice for incorporating/recording an AEFI?	AEFIs should be marked on the client's DA record if they experienced an AEFI immediately following immunization within 15-30 min, documentation should be completed on the Adverse Event Following Immunization form. As part of best practice, it is recommended that the clinician that is checking off the AEFI check box also include a clinical note or create an alert on the client profile so that the next immunizer is prompted with a warning should the client come back for another dose in the future. If a client has experienced an immediate AEFI and the check box is selected on the DA the checkbox on the client record "Any Adverse Events After Immunization?" will always be populated in COVax$_{ON}$.
24.	Is it mandatory to enter RIM in the client profile versus when it was completed in the DA?	As best practice and to minimize the amount of data entry for immunizers it is recommended for registration staff to tag the VE (vaccination event) and RIM (reason for immunization) to the client profile. However, if neither is done it will prompt for the VE and RIM during the immunization.

Generating Receipts

#	Question	Answer
25.	Can we go back to the patient profile to send the email receipt?	Yes. You can generate the receipt any time after the dose administration. You can generate the receipt through the client's dose administration record which can be found on the client profile under the "Client Immunizations" tab. If a client has provided their email address and 'Generated Receipt' is selected and email will be sent to the client with the dose information.
26.	Will we have to generate the receipt in the DA record?	Yes. As part of the new clinical flow modernization changes, the receipt is not automatically generated after the dose administration. Therefore, if the client wants a physical copy of their receipt or to have a URL sent to their email, the staff will have to go into the client profile and trigger the receipt (via "Generate Receipt" button) located on the client dose administration record.

#	Question	Answer
27.	Is the vaccine receipt URL in the same place or has it moved to the DA record?	It's in the same place. It can be located on the client profile under the Details tab → Basic Information section → Vaccine Receipt URL field
28.	Will an email receipt automatically be sent or is a manual step required?	An additional manual step is required to generate the receipts (both the physical copy and the URL email). A vaccination receipt will only be emailed if "Generate Receipt" is selected. The "Generate Receipt" button can be found on the client record → Client Immunizations tab → select a DA record link → "Generate Receipt" is located at the top left-hand corner of the DA record.

Client Consent

#	Question	Answer
29.	To clarify, the vaccine can still be administered, however we cannot document in COVax_{ON} if the client does not consent to data collection?	There are two types of consent. First is consent for data collection use and disclosure which sits on the client profile under the "Client Consent Information" section. The checkbox for this consent is labelled "consent for data collection" and needs to be checked off before the immunizer proceeds with recording the dose administration in COVax_{ON}. If the client does not consent to data collection, then the dose administration can be recorded offline via paper form. The second type is consent to receive the vaccine and all recommended doses in the series. This consent sits on the client dose administration record and is required to be checked off during the dose administration process using the "New Immunization" button.
30.	How do we obtain the consent for data collection, and does it follow through each time?	Consent for data collection, use and disclosure would be obtained verbally and the checkbox for "consent for data collection" needs to be checked off before the immunizer proceeds with recording the dose administration in COVax_{ON}. Note: Only needs to check for the initial dose (1^{st} dose), consent will carry through for all subsequent doses.

#	Question	Answer
31.	Will the consent proxy information appear in the DA now for each dose under Consent & Assessment or does it remain in the client profile?	Proxy Consent within the dose administration flow when selected will enable users to enter the Proxy information e.g., Name, Phone, Relationship. This will then be populated on the client record under Proxy information. If proxy does change between doses the history will appear under the "related" tab within the Person Account History section.

CFM Training & Training Materials

#	Question	Answer
32.	Will the PowerPoint presentation that is used by the MOH for training sessions (not train-the-trainer) be available (end user training)?	Yes, all of the training materials will be available on the SharePoint site. Training artifacts include the following: • CFM training schedule • CFM training roll out plan • CFM training environment login and generic account information • CFM as-is | to-be clinical modernization overview • CFM train-the-trainer manual • CFM end-to-end training deck • CFM changes-only training deck • CFM job aids • CFM functionality change document • CFM training recording (changes-only and full end-to-end (E2E))
33.	Do we as trainers have permission to use parts of the decks to facilitate our own sessions?	Yes, all trainers/sites are welcomed to tailor the decks to suit your needs. Any material changes made to the current CFM training materials will be communicated (via email) to the trainers/leads. An editable version of the CFM training artifacts can be found on COVax$_{ON}$ SharePoint site here.

#	Question	Answer
34.	Since end users do not have access to MOH SharePoint, how would trainers share materials with them?	COVax$_{ON}$ SharePoint access is only provided to site leads and trainers. Access is not provided at the user level. All trainers and site leads are asked to distribute the materials to their users via your own internal document sharing platform. Trainers can share materials with their team via Microsoft's Teams site or their own internal SharePoint site.
35.	Will this training session be recorded? Will there be recorded videos available on SharePoint that demo functionality for end users?	The live training sessions will not be recorded. However, there are pre-recorded CFM training recordings available on SharePoint for all trainers and leads to review/access. Training recording includes: • CFM changes-only • CFM end-to-end (E2E) • CFM historical dose functionality (only applicable to certain users/organizations)
36.	Do we have access to the new training sandbox?	Yes, a new CFM training environment has been created. Generic accounts have been provided for each workstream and can be found on the MOH COVax$_{ON}$ SharePoint site. CFM training environment link: https://covaxon--training.my.salesforce.com/ Training test data (e.g., AO, VE, inventory) has been set up for each generic account. Training test data information can be found in the CFM training environment document (slide 3). IMPORTANT: Between now and June 8, 2022 (go live), the CFM training environment is subject to change, as the team develops and deploy new updates related to clinical flow modernization. Any training environment outages will be communicated to all site leads and trainers via email communication. The existing clinical flow training environment will still be available to support any net new users being onboarded during this transition period. Please note the existing clinical flow training environment will be decommissioned on June 6, 2022.